



Modern Governance for Municipalities

The How-To Guide

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“With broadcasting meetings live now, we have some nights where there are more viewers than we ever would have had in person. So [iCompass] has gotten it out there to people who maybe couldn’t make it to a meeting, but they can listen to it while they’re doing something else at home. It has really opened up how many people can view our meetings.”

Kathryn Mayfield
Board of Education Clerk,
Wamego, Kansas

Even for the most prepared governments, 2020’s transition to completely virtual public meetings and decision-making required adjustments to the tools and strategies used to facilitate healthy governance – tools and strategies that often had to be enhanced or amended on the fly.

Now, that short-term, short-viewed transition looks to become the new long-term reality.

At Diligent’s Modern Governance Summit 2020, executives and legal and governance professionals from across the globe gathered to share experiences and solutions from this unprecedented year. Their firsthand perspectives and discussions create the blueprint for online governance into 2021 and beyond.

This guide compiles their key insights and illustrates best practices for governance leaders in these areas:

- **Strategy & Governance**
- **Security & Collaboration**
- **Risk & Accountability**

As we navigate the new normal, Diligent looks forward to continuing as your trusted partner.



Brian Stafford
President & CEO,
Diligent Corporation



STRATEGY & GOVERNANCE

Best Practices

- Build agendas efficiently using digital tools like iCompass' AgendaBuilder.
- Enable remote voting so council members can continue strategic decision-making anytime, anywhere.

iCompass Supporting Features

- Utilize remote agenda building and identify streamlined workflows.
- Automate minute creation with fast online approvals.

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“Change – even though it’s very drastic and somewhat jarring – really does represent a huge opportunity for governance of our communities.”

Ken Surdan
Chief Product Officer, Diligent

Embrace Virtual Governance

If there was one message that came out of managing governance in 2020, it’s this: Municipalities that had already embraced tools for virtual meetings were able to respond faster to unexpected change. During Modern Governance Summit 2020, Kathryn Mayfield, Board of Education Clerk, Wamego, Kansas, described this change:

“[Recent events have] made our agendas a lot longer,” Mayfield explained. “There have been a lot of special meetings, and agendas sometimes have the attachments changed midstream.”

For administrators responsible for packet assembly, the spring and summer months brought an uptick not only in meetings, but in frequent requests for agenda packet changes that would have been near-impossible or extremely burdensome using traditional methods. The ability to reorder agenda items, add items or supporting materials, or build connections between policy changes and historical activities meant less stress during an otherwise overwhelming governance season.



“It’s been challenging having so many meetings this year; it seemed like we were meeting every week for a long time. But the fact that I can build the packets easily for all these meetings makes it a lot less stressful, for sure.”

Kathryn Mayfield
Board of Education Clerk, Wamego, Kansas

Even governments already using online agendas often had to adapt quickly, however. In a process that likely sounds familiar to many local government representatives, Mayfield described the transition to virtual public meetings:

“Because we couldn’t have public attendance, we had to figure out how we were going to broadcast our public meeting,” explained Mayfield. “We started with a camera and all of us on a stage... They filmed us and broadcast it. But people couldn’t hear and didn’t know who was speaking. That was an issue.”

Next, Mayfield described her journey of trial and error on platforms like Zoom, Facebook and YouTube: “[Now] we still use Zoom and a camera and a very, very expensive microphone that can pick up a fly on the other side of the room. That’s how we broadcast now.”

During Modern Governance Summit 2020, iCompass customers shared similar stories of digital transformation, often finding hidden efficiencies and benefits along the way.



SECURITY & COLLABORATION

Best Practices

- Enable security features across an entire agenda and meeting management platform to ensure the right people are accessing the right information at the right time.
- Enable specific, secured access based on users' needs.

iCompass Supporting Features

- Benefit from world-class hosting data centers that are ISO 27001 certified and maintain SOC attestations. The data center provides physical, environmental, and access security with numerous controls available.
- Set permissions at the document and folder levels to permit and restrict access where applicable.

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Protect Sensitive Information



“There have been many incidents where outsiders have joined some confidential online meetings, incidents known as ‘Zoom-bombing,’ [that] have taken the news by storm during the first few months of the lockdown. Fortunately, as online meeting hosts, there are steps you can take to make your meetings as secure as possible.”

Kinda Nehlawi

Training and Documentation Specialist, iCompass

With the transition to online meetings, protecting not only sensitive information but also the sanctity and effectiveness of the meeting space has become more critical. This requires the right technology and the right training. Transitioning councils onto new virtual platforms requires more efficient processes and enhanced education to ensure council members are collaborating effectively.

Tammie Organski, IT Project Manager from Newport News, Virginia, shared her city’s experience with training over 100 staff on iCompass. She emphasized that the city already had laid the groundwork for the effort. “We had a city initiative for innovation and modernizing government,” Organski said “This hit those goals.”

During Modern Governance Summit 2020, speakers highlighted several strategies for protecting sensitive information, including:

- Using a new link for each meeting.
- Enabling online waiting rooms to admit only legitimate attendees.
- Disabling participants’ ability to share their screens.

These practices have been successful in limiting the opportunity for disruptive behavior, said customers, but it all starts with a central and secure repository for council member communications.



Improve Access

Best Practices

- Ensure accessibility standards are met by partnering with a technology vendor that keeps inclusivity and access top of mind.
- Publish meeting information consistently for the public to access what they need.
- Manage citizen input and requests efficiently with digital trackers in place.

iCompass Supporting Features

- Optical Character Recognition (OCR) automatically processes PDF documents into searchable form.
- Build links directly into the iCompass meeting agenda and easily locate them.
- Use iCompass' Action Tracker to manage public information requests for more efficient workflows.

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To governance officials, “accessibility” has two meanings. The first, adherence to laws and regulations that ensure access to the disabled, is a basic requirement of modern governance; noncompliance can be costly. Secondly, as Mayfield noted in her session, online meetings have created new opportunities for access for those individuals in the community who, because of work or family conflicts, previously had not been able to attend or participate in meetings.

Increased accessibility to local governance could be one of the bright spots of the changes brought on by 2020. Lori McWilliams, Village Clerk, Village of Tequesta, Florida, underscored this silver lining in another session:



“One of our vendors recently said something to me, and it’s really stuck with me: Accessibility is not about technology. It’s about people.”

Lori McWilliams
Village Clerk, Village of Tequesta, Florida

McWilliams noted that she works with a civic leader who has vision problems, which serves as a regular reminder of the value and necessity of accommodating different abilities.

Diligent’s Modern Governance Summit 2020 capped a season in which governance leaders were required to respond quickly, efficiently and with clear thinking in a crisis situation that was certainly unprecedented. The lessons learned – and best practices that have resulted – will be a valuable guide as we navigate the new norms of today’s civic expectations. iCompass and Diligent look forward to continued collaboration with today’s municipalities and providing the tools necessary to help you succeed.

**For more information or to request a demo, contact us today:
Email: sales@icompasstech.com | Visit: icompasstech.com**